

000173

Appendix B: Proposer's References

000174

Proposal No. 8520-07-Z-RFP

Page 40 of 43

VII. FORMS**PROPOSER'S REFERENCES**

The Proposer is **required** to provide a minimum of three (3) references where work of a similar size and nature was performed within the past five (5) years. This will enable the City of San Diego to judge the responsibility, experience, skill, and business standing of the Proposer.

REFERENCES

Company Name: United States Navy NAVSUP Fuels **Contact Name:** Samantha Darella

Address: 2100 Second St. SW

Phone Number: (619) 532-3758

Washington, DC 20593

Fax Number: N/A

Dollar Value of Contract: \$259,851.63

Contract Dates: 1/06 – 8/06

Requirements of Contract: A-76 Competitive Sourcing, A-76 Preliminary Planning/ SOW
Development

The U.S. Navy engaged Grant Thornton to provide Preliminary Planning and Performance Work Statement support for the Naval Supply (NAVSUP) Fuels functions located in Jacksonville, FL, San Diego, CA, Manchester, WA, and Pearl Harbor, HI. These functions encompassed one hundred and fifty eight FTE positions. (Please note that the PWS is equivalent to the SOW, as defined by the City of San Diego.)

Pursuant to Navy requirements and the Grant Thornton Preliminary Planning Methodology, Grant Thornton provided consulting services and developed deliverables including a Communication Plan, a Training Plan, a Competition Timing Analysis, a Market Research Plan, a Market Research Report, a Scoping and Grouping Report, a Workload Data Pre-Collection Assessment, Workload Data Collection Results, a Property Inventory Report, a Preliminary Planning Report, a Baseline Costs Report, and a Best Practices/Lessons Learned Report. In addition, Grant Thornton provided guidance on the Type of Competition, Schedule, Roles and Responsibilities of Participants, Competition Officials, and Incumbent Service Providers. The Grant Thornton Team was awarded a follow-on contract to support the Navy with the development of the PWS. This engagement included phased reviews of the PWS, or SOW, as well as the development of a Quality Assurance Surveillance Plan and other related solicitation documents. The Navy's requirements for a phased PWS development closely mirror those identified in the RFP.

000175**Company Name:** U.S. Marine Corps, 29 Palms**Contact Name:** Samantha Darella**Address:** 1220 Pacific Highway**Phone Number:** (619) 532-3758

San Diego, CA 92132

Fax Number: N/A**Dollar Value of Contract:** \$775,679**Contract Dates:** 6/00 – 5/03**Requirements of Contract:** A-76 Competitive Sourcing

Grant Thornton performed an OMB Circular A-76 study of the Facilities Maintenance Division (FMD) functions at the Marine Corps Air and Ground Combat Center (MCAGCC) at 29 Palms, CA. The MCAGCC FMD study encompassed Utilities Distribution and Management; Real Property Maintenance and Repairs to include roads and grounds; Planning, Engineering and Inspections. The functions under study included: Carpentry, plumbing, locksmith, sheet metal, signs and painting, heat-ventilation and air-conditioning, pest control, rock quarry and land-fill operations, planning, blue prints, specifications, inspections, associated logistics, and the procurement of repair parts and material.

Grant Thornton supported the Government on-site at 29 Palms in performing all phases of the A-76 study including:

- Data collection using an activity based costing (ABC) methodology;
- Development of the PWS including: the performance of employee interviews, job and process analysis, development of performance standards, and performance indicators metrics;
- Development of the Quality Assurance Surveillance Plan and the Performance Requirements Summary;
- Conducting the Management Study Phase, which included the development of the Most Efficient Organization, Technical Performance Plan, and conducting market surveys as required;
- Development of the in-house cost estimate;
- Preparation of the solicitation package;
- Support during the Independent Review Phase, including responses to questions raised by the Independent Review Officer and incorporating the required changes to the Management Study; and,
- Benchmarking and best practices of Base Operations Support (BOS) functions were incorporated in the MEO development. The Grant Thornton Team identified industry best practices and assessing BOS operations against other government and industry providers.

000176

Company Name: U.S. Naval Facilities & Engineering **Contact Name:** Ronald Gilchrist

Command – Southwest

Phone Number: (619) 532-3143**Address:** 1220 Pacific Highway, Bldg 127**Fax Number:** (619) 532-3143

San Diego, CA 92132

Dollar Value of Contract: \$78,055**Contract Dates:** 9/06 – 2/06**Requirements of Contract:** Development of Performance Metrics

In August of 2005, the Navy created the NAVFAC Southwest organization by merging two existing facilities and engineering organizations, Southwest Division and Public Works Center San Diego. This new organization needed a comprehensive and selected set of metrics that reflected the augmented mission, aligned to the new business framework, and supported business line strategies. NAVFAC leadership also put an emphasis on developing metrics for areas of desired improvement where few metrics were available such as client satisfaction, workforce development, and worker safety.

Grant Thornton's approach began with an organizational context setting where we captured the new business framework which showed the relationships between processes, products and services resulting from those processes (outputs), customers receiving and using those outputs, and NAVFAC's desired outcomes. The context setting also included recommendations on changes to the management approach for the combined organization, definitions of roles and responsibilities of organizational sub-units, an articulated performance management vision, and a discussion of cultural barriers and suggestions to overcome them. Setting an organizational context produced a foundation upon which to build metrics.

During the next phase, metric identification and assessment, Grant Thornton collected and graded current metrics and those desired by NAVFAC managers for maturity. Metrics in both categories were scored against the following maturity criteria:

- Definition: Specificity of metric description.
- Data availability: Existence and accessibility of data/data sources.
- Baseline Indicator: An initial measurement has been taken.
- Calculation: Business rules for computation of performance.
- Success Threshold: A target level of performance has been set

A score of five indicated a full mature metric while a score of zero indicated an immature metric. Metric identification and assessment revealed what metrics were out there and how usable they were to NAVFAC managers.

Next, Grant Thornton prioritized immature metrics for development, on a scale of one to four with one being highest priority, based on the following criteria:

- Is the metric required to report up and/or out of Southwest?
- Is metric used to make business decisions?
- Is or should this measure be of use/interest to Southwest Command?
- Is this metric in manager's top five?

Metric prioritization told NAVFAC what metrics to develop first. This phase also 1) compared NAVFAC's metrics to those commonly used across government and industry in each business line such as real estate, capital improvements, and acquisition, and 2) produced a metrics action plan that recommended development steps in six categories:

- Automation: Metric requires development of a system or application.
- Process: Metric requires identification of and agreement to a series of steps or tasks to be reported.
- Data: Metric requires precise, accurate information elements to produce a valid and reliable measurement.
- Baseline: Metric requires an initial measurement.
- Definition: Metric requires a precise and agreed-to description to be consistently applied.
- Owner: Metric requires assignment of accountability to be consistently reported.

Following prioritization, metric specification added the necessary substance behind a sub-set of mature metrics for inclusion into the decision support system. Specification fields included operational definitions, business rules for calculation, success thresholds, data users, data sources, and reporting frequency. Adding specifications such as these to the decision support system will make performance data more accessible and useable to NAVFAC managers.

Lastly, metric compilation and integration aligned all metrics with items in the business framework that resulted from phase one. The exercise revealed the degree to which performance metrics measured what was important to the business lines; i.e. customers, product and services, and outcomes. In other words, it revealed whether the business lines were measuring the "right" things. Findings included the framework element where the most metrics were aligned (outcomes), and the high uniformity of outcomes among NAVFAC business lines.

000178

Company Name: Installation Management Agency, **Contact Name:** Jose Roman
West Point Garrison

Address: 681 Hardy Place
West Point, NY 10996

Phone Number: 845.938.69.48

Fax Number: 845.938.4934

Dollar Value of Contract: \$899,819

Contract Dates: 8/06 to 9/07

Requirements of Contract: A-76 Competition on the Directorate of Public Works (DPW)

In April 2006, Grant Thornton was selected as one of the Blanket Purchase Agreement's (BPA) multi-year service providers to support the Installation Management Agency's OMB A-76 Competitive Sourcing initiative. In July 2006, Grant Thornton was awarded the first and largest Task Order under the BPA to support the A-76 Competition of the Directorate of Public Works (DPW) function at U.S. Army Garrison, West Point. The DPW function includes approximately 531 federal positions and support contracts within operations and maintenance, housing, engineering, master planning, and business and operations/integration functional areas. Grant Thornton has been tasked with providing support to all phases of the competition to include conducting preliminary planning, developing the Performance Work Statement and associated acquisition and solicitation documents, developing the Continuing Government Organization (CGO), developing the Agency Tender and supporting the source selection process.

Grant Thornton is conducting preliminary planning activities, to include developing and maintaining a POA&M, developing a comprehensive competition plan, developing and delivering training, completing the nine steps of preliminary planning as outlined in the Circular (e.g., scoping, grouping, baseline costs, competition type), developing a Preliminary Planning Baseline Cost Report, developing a Communications Plan and developing a Preliminary Planning Report documenting the results of the preliminary planning effort.

After public announcement, Grant Thornton will begin supporting the Acquisition Phase of the competition. During the Acquisition Phase, Grant Thornton will develop and deliver PWS team training, develop an outcome-based PWS and all associated technical exhibits, define performance measures in a Performance Requirements Summary, develop the Quality Assurance Surveillance Plan, determine Government Furnished Property, develop the Adjusted Baseline Cost Report, and assist the Contracting Officer with the development of the solicitation. In addition, Grant Thornton is responsible for developing the CGO, providing support to the acquisition, appeals and contest processes and developing lessons learned and best practices.

000179

Company Name: Fort Sam Houston Garrison**Contact Name:** Gary Hankins**Address:** 2107 17th Street, Building 4197**Phone Number:** (210) 221-4122

Ft. Sam Houston, TX 78234

Fax Number: (210) 295-8667**Dollar Value of Contract:** \$7,685,339**Contract Dates:** 2/01 – 6/06**Requirements of Contract:** A-76 Competitive Sourcing, Transition Support, and Post Implementation Support

Grant Thornton was originally engaged by the U.S. Army to complete the job analysis of the A-76 Whole Base Commercial Activities Cost Comparison (WBCACC) at Fort Sam Houston Garrison. The activities on which the WBCACC were performed encompass approximately 1200 authorizations, both military and civilian and included Visual Information (VI), Information Technology, Human Resources, Administrative Services, Public Works, Engineering, Housing, Environmental, Logistics, Logistics Maintenance, Supply, Training Range Maintenance, Operations and Mobilization, Resource Management, Public Affairs, and Provost Marshal Support functions. Grant Thornton supported the effort to develop three Performance Requirements Documents (PRDs) and MEOs encompassing BOS, VI, and Museum functions. The BOS and VI studies are complete and both were Government MEO wins. Under this engagement, Grant Thornton provided the following services:

- Identified and responded to A-76 related issues and coordinated with the government team.
- Maintained the POA&M for all three studies and developed the study plans.
- Analyzed the effectiveness and efficiency of using credit cards and other contract augmentation to provide supplemental goods and services in support of operations.
- Reviewed and enhanced the BOS PRDs with particular emphasis on the workload and performance measures. Additionally, developed PRDs for VI and Museum functions. Grant Thornton also worked closely with the client to draft a Quality Assurance Surveillance Plans reflecting the needs of the customers on the installation.
- Developed Management Studies including MEOs for BOS, VI, and Museum functions. Collected and analyzed data with Grant Thornton's automated tool, CAAdvantage™. CAAdvantage allowed us to organize our data collection and run what-if scenarios, including cost comparison simulations, and it tracks each PWS requirement through the MEO for Independent Review Officer (IRO) crosswalk purposes. We developed a quality competitive BOS MEO in six months due in large part to our use of CAAdvantage.
- Cooperated with the IRO (i.e., Army Audit Agency) and the client to certify the MEOs. We provided auditable documentation and analysis in hard copy and through CAAdvantage.

000180

- Developed IGEs using industry data to benchmark the private contractors during the source selection process. The IGE helped identify occasions where the private contractors have potentially under bid the existing requirements.
 - Identified CGA requirements, developed staffing needs and position descriptions and conducted a CGA affordability analysis.
 - Assisted the Source Selection Evaluation Board with defining evaluation criteria and review processes.
 - Supported the Administrative Appeals and General Accounting Office (GAO) Protest efforts.
 - Facilitated Transition planning including the development of a detailed Transition POA&M and CGA training requirements.
-

000181

Appendix C: Sample POA&M

ID	Task Name	Duration	Start	Finish
1	Contract Award	0 days	Tue 1/2/07	Tue 1/2/07
2	Task Award	0 days	Tue 1/2/07	Tue 1/2/07
3	Post Award Kick-Off Meeting	1 day	Thu 1/4/07	Thu 1/4/07
4	Monthly Progress Report	130 days	Mon 1/15/07	Fri 7/13/07
5	Weekly Progress Report	121 days	Mon 1/8/07	Mon 6/25/07
6	Preliminary Planning	40 days	Mon 1/8/07	Fri 3/2/07
7	1st Preliminary Planning Meeting	2 days	Mon 1/8/07	Tue 1/9/07
8	Scope and Grouping	15 days	Wed 1/10/07	Tue 1/30/07
9	Market Research Plan	5 days	Tue 1/9/07	Mon 1/15/07
10	Market Research Report	11 days	Tue 1/16/07	Tue 1/30/07
11	2nd Preliminary Planning Meeting	1 day	Wed 1/31/07	Wed 1/31/07
12	Workload Data Pre-Collection Assessment	5 days	Thu 2/1/07	Wed 2/7/07
13	Workload Data Collection Results	10 days	Thu 2/8/07	Wed 2/21/07
14	Property Inventory	10 days	Thu 2/1/07	Wed 2/14/07
15	Baseline Cost Report	10 days	Thu 2/1/07	Wed 2/14/07
16	Preliminary Planning Report	15 days	Thu 2/1/07	Wed 2/21/07
17	3rd Preliminary Planning Meeting	1 day	Thu 2/22/07	Thu 2/22/07
18	Best Practices and Lessons Learned	4 days	Tue 2/27/07	Fri 3/2/07
19	SOW Development	97 days	Thu 2/15/07	Fri 6/29/07
20	SOW Training Module for Broad Audience	1 day	Thu 2/15/07	Thu 2/15/07
21	SOW Training Module for Project Team	1 day	Wed 2/28/07	Wed 2/28/07
22	1st SOW Development Meeting	2 days	Thu 3/1/07	Fri 3/2/07
23	SOW Development and Competition POAM	2 days	Thu 3/1/07	Fri 3/2/07
24	Development of 30% SOW Deliverable	14 days	Mon 3/5/07	Thu 3/22/07
25	2nd SOW Development Meeting and Review of 30% SOW Deliverable	1 day	Fri 3/23/07	Fri 3/23/07
26	Development of 50% SOW Deliverable	14 days	Mon 3/26/07	Thu 4/12/07
27	3rd SOW Development Meeting and Review of 50% SOW Deliverable	1 day	Fri 4/13/07	Fri 4/13/07
28	Development of 80% SOW Deliverable	14 days	Mon 4/16/07	Thu 5/3/07
29	4th SOW Development Meeting and Review of 80% SOW Deliverable	1 day	Fri 5/4/07	Fri 5/4/07
30	Development of 100% SOW Deliverable	15 days	Mon 5/7/07	Fri 5/25/07
31	Review of 100% SOW Deliverable	5 days	Mon 5/28/07	Fri 6/1/07
32	Final SOW Deliverable	5 days	Mon 6/4/07	Fri 6/8/07
33	Quality Assurance Surveillance Plan(QASP)/Performance Assessment Plan	20 days	Mon 5/28/07	Fri 6/22/07
34	Independent City Estimate (ICE)	20 days	Mon 5/28/07	Fri 6/22/07
35	Adjusted Baseline Cost Report	20 days	Mon 5/28/07	Fri 6/22/07
36	SOW Development Report	10 days	Mon 6/11/07	Fri 6/22/07
37	Best Practices and Lessons Learned	10 days	Mon 6/18/07	Fri 6/29/07

000183

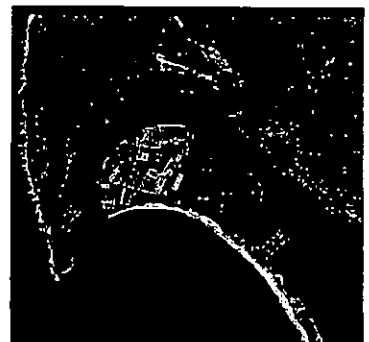
Grant Thornton 

**Proposal for 8520-07-Z-RFP, Preliminary Planning and
Statement of Work (SOW) for the Managed Competition
Initiative**

Volume II – Price Proposal

November 16, 2006

Copy



000184

Grant Thornton 

Accountants and
Management Consultants

Grant Thornton LLP
The US Member Firm of
Grant Thornton International

November 16, 2006

Mr. Michael Winterberg
Procurement Specialist
City of San Diego, California
Purchasing Division
1200 Third Avenue, Suite 200
San Diego, CA 92101-4195

Reference: RFP 8520-07-Z-RFP for Preliminary Planning and Statement of Work
support services for the City of San Diego's Managed Competition Initiative.

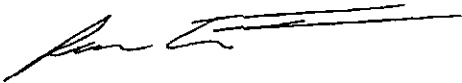
Dear Mr. Winterberg:

Grant Thornton LLP is pleased to submit the enclosed price proposal to request for proposal (RFP) 8520-07-Z-RFP for Preliminary Planning and Statement of Work support services for the City of San Diego's Managed Competition Initiative. In accordance with the RFP Instructions to Offerors, we are submitting our technical and cost proposals in separate volumes.

Grant Thornton looks forward to working with you on this important effort. Should you require any additional information, please contact me at (703) 637-2735 or Ms. Deirdre Pender, our Director of Contracts, at (703) 837-4536.

Sincerely,

GRANT THORNTON LLP



Ramon Contreras
Principal

Suite 500
333 John Carlyle Street
Alexandria, VA 22314
703.837.4400 Tel
703.837.4466 Fax

000185

Proposal for RFP 8520-07-Z-RFP, Preliminary Planning and Statement of Work (SOW) for the Managed Competition Initiative

Volume II – Price Proposal

November 16 2006

Submitted by:

Grant Thornton LLP
333 John Carlyle Street, Suite 500
Alexandria, VA 22314
Phone: (703) 837-4400
Fax: (703) 837-4455

Person authorized to negotiate with the Government and sign this Proposal:

Ramon Contreras
Principal
Phone: (703) 637-2735
Fax: (703) 837-4455
ramon.contreras@gt.com

This proposal or quotation includes data that shall not be disclosed outside the Government and shall not be duplicated, used or disclosed – in whole or in part – for any purpose other than to evaluate this proposal or quotation. If, however, a delivery order is awarded to this offeror or quoter as a result of – or in connection with – the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction is contained in sheets marked "Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal or quotation."

Table of Contents

Section 1:	Pricing Assumptions and Invoicing	1
1.1	Introduction	1
1.2	Assumptions	1
1.3	Travel Costs	2
Appendix A:	Offer Sheet	A-1
Appendix B:	Pricing Page	B-1
Appendix C:	Proposer's Statement of Financial Responsibility	C-1
Appendix D:	Certification Survey	D-1

Section 1: Pricing Assumptions and Invoicing

1.1 Introduction

Mayor Sanders has outlined a management vision for San Diego to “reduce waste, duplication and bureaucracy; and ... search for more cost-effective ways to provide quality services.”¹ We understand that on November 7th the voters in the City of San Diego authorized “Managed Competitions” between City departments and qualified outside providers. We further understand that this initiative (“Proposition C”) is a key part of the Mayor’s platform to improve City efficiency and effectiveness.

In order to undertake a managed competition effort, the City of San Diego requires the support of a contractor to lead preliminary planning and Statement of Work (SOW) development activities for a number of City functions and/or services. As this proposal will illustrate, Grant Thornton brings experience in assisting government clients with strategic planning for competition selection and with the execution of competitions. In addition, Grant Thornton professionals have supported numerous clients with competitive sourcing and related business improvement studies for a range of Public Works related services. This experience makes our firm a natural partner for the City of San Diego to help realize its goals for improving the effectiveness and efficiency of services.

Grant Thornton is pleased to provide this price proposal to the City of San Diego for Preliminary Planning and Statement of Work (SOW) Development for its Managed Competition Initiative. This proposal, submitted in response to Request for Proposal (RFP) 8520-07-Z-RFP, is based upon performing Preliminary Planning and SOW Support as described in our Technical Volume. This proposal is valid for 90 days from receipt.

1.2 Assumptions

Grant Thornton has based this cost proposal on the following assumptions. Should these assumptions be incorrect, our cost proposal may be impacted.

- All payments for services will be based on the successful delivery and acceptance of deliverables presented in our technical volume. Payment schedules will be developed and submitted as part of task award negotiation.

¹ Mayor’s 2006 State of the City Fact Sheet, published January 12, 2006,

- The City of San Diego will provide timely access to pertinent information that is necessary to complete the tasks in line with each task order and associated schedule that falls under the BPA resulting from this proposal. Pertinent information includes, but is not limited to, records, personnel for interviews and systems.
- The City of San Diego will provide comments on draft deliverables in a timely and according to the schedule developed and approved for a given task order. Delays related to City of San Diego actions may push the timeframe beyond that which is initially planned for the competition. Grant Thornton will not be held liable for delivery delays that result from City actions or delays.
- The rates are fixed for the first year of the contract, with additional contract year rates negotiated through the "Option to Renew" process defined in the RFP.
- Grant Thornton's proposed cost is based on a six month period of performance as shown in Appendix B.

1.3 Travel Costs

All rates are fully burdened with travel costs. The Grant Thornton team will not travel without prior notification and coordination with the City of San Diego Project Manager.

000189

Appendix A: Offer Sheet

OFFER SHEET

Lump-Sum prices shall be all work in accordance with the requirements of this **RFP 8520-07-Z-RFP, Preliminary Planning and Statement of Work (SOW) for the Managed Competition Initiative**, but not including any work indicated or specified to be provided under any other items. The contractor shall furnish all services including labor, material, and equipment necessary to accomplish the task required by the Proposed Task Order including all incidental related work.

NAME OF THE CONTRACTOR: Grant Thornton LLP
STREET ADDRESS: 333 John Carlyle Street, Suite 500
COUNTY: Fairfax
CITY, STATE, AND ZIP CODE Alexandria, Virginia 22314

SIGNATURE OF PERSON AUTHORIZED

TO SIGN QUOTATION: _____ **Date** 11/ 15 /06
PHONE NUMBER: (703) 637-2735

Proposal acceptance period: 90 calendar days

000190

Appendix B: Pricing Page

000191

DOCKET SUPPORTING INFORMATION
CITY OF SAN DIEGO

DATE:

June 11, 2008

EQUAL OPPORTUNITY CONTRACTING PROGRAM EVALUATION

SUBJECT: Authorize Funding Transfer for Managed Competition Consultant Support

GENERAL CONTRACT INFORMATION

Recommended Consultant: Grant Thornton LLP
Amount of this Action: 1,100,000.00
Funding Source: City
Goal: 15% (MBE/WBE/DVBE/DBE)

SUBCONTRACTOR PARTICIPATION

There is no subconsultant activity associated with this action.

EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE

Equal Opportunity: Required

This action authorizes the Mayor to ratify contract 8020-07-Z with Grant Thornton LLP for Managed Competition Program support. Grant Thornton LLP submitted a Workforce Report for their Cook County office dated March 20, 2008, which reflects 4,937 employees. An analysis of the Workforce Report indicates under representation in the following area:

African American – Management & Financial, Professional
Filipino – Management & Financial, Professional
Female – Management & Financial, Professional

Grant Thornton LLP has been requested to submit an Equal Opportunity Plan which details strategies to remedy deficiencies in their workforce.

ADDITIONAL COMMENTS

The *Work Force Analysis* is attached.

by:AMJ

File: Admin WOFO 2000

Date WOFO Submitted: 3/20/2008

Input by: jpm

Goals reflect statistical labor force

Availability for the following:

2000 CLFA

Cook County, IL

City of San Diego/Equal Opportunity Contracting
WORK FORCE ANALYSIS REPORT

FOR

Company: Grant Thornton
Project: Managed Competition

I. TOTAL WORK FORCE:

	Black			Hispanic			Asian			American Indian			Filipino			White			Other		
	CLFA Goals	M	F	CLFA Goals	M	F	CLFA Goals	M	F	CLFA Goals	M	F	CLFA Goals	M	F	M	F	M	F		
Mgmt & Financial	7.3%	29	36	1.4%	43	27	0.1%	87	66	0.0%	3	2	0.1%	0	0	831	532	0	0		
Professional	11.4%	79	110	1.5%	69	68	0.1%	191	256	0.0%	4	4	0.1%	0	0	1023	964	0	0		
A&E, Science, Computer	3.6%	0	0	2.4%	0	0	0.4%	0	0	0.0%	0	0	0.4%	0	0	0	0	0	0		
Technical	10.7%	2	3	0.6%	0	1	0.0%	2	2	0.0%	1	0	0.0%	0	0	4	18	0	0		
Sales	12.5%	0	0	1.1%	0	0	0.3%	0	0	0.0%	0	0	0.3%	0	0	0	0	0	0		
Administrative Support	16.9%	18	77	1.3%	5	42	0.0%	4	15	0.0%	1	0	0.0%	0	0	24	294	0	0		
Services	26.0%	0	0	6.5%	0	0	0.0%	0	0	0.1%	0	0	0.0%	0	0	0	0	0	0		
Crafts	12.5%	0	0	3.0%	0	0	0.0%	0	0	0.0%	0	0	0.0%	0	0	0	0	0	0		
Operative Workers	29.0%	0	0	10.6%	0	0	1.4%	0	0	0.1%	0	0	1.4%	0	0	0	0	0	0		
Transportation	31.7%	0	0	4.0%	0	0	1.3%	0	0	0.0%	0	0	1.3%	0	0	0	0	0	0		
Laborers	23.3%	0	0	17.4%	0	0	0.1%	0	0	0.0%	0	0	0.1%	0	0	0	0	0	0		
TOTAL		128	228		117	138		284	339		9	6		0	0	1882	1808	0	0		

HOW TO READ TOTAL WORK FORCE SECTION:

The information blocks in Section 1 (Total Work Force) identify the absolute number of the firm's employees. Each employee is listed in their respective ethnic/gender and employment category. The percentages listed under the heading of "CLFA Goals" are the County Labor Force Availability goals for each employment and ethnic/gender category.

Mgmt & Financial
Professional
A&E, Science, Computer
Technical
Sales
Administrative Support
Services
Crafts
Operative Workers
Transportation
Laborers

TOTAL EMPLOYEES		
ALL	M	F
1656	993	663
2768	1366	1402
0	0	0
33	9	24
0	0	0
480	52	428
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0

Female Goals
40.1%
59.9%
23.4%
65.7%
51.2%
78.3%
68.0%
12.9%
43.2%
16.6%
10.3%

HOW TO READ EMPLOYMENT ANALYSIS SECTION:

The percentages listed in the goals column are calculated by multiplying the CLFA goals by the number of employees in that job category. The number in that column represents the percentage of each protected group that should be employed by the firm to meet the CLFA goal. A negative number will be shown in the discrepancy column for each underrepresented goal of at least 1.00 position.

II. EMPLOYMENT ANALYSIS

TOTAL

	Black			Hispanic			Asian			American Indian			Filipino			Female		
	Goals	Actual	Discrepancy	Goals	Actual	Discrepancy	Goals	Actual	Discrepancy	Goals	Actual	Discrepancy	Goals	Actual	Discrepancy	Goals	Actual	Discrepancy
Mgmt & Financial	120.89	65	(55.89)	23.18	70	46.82	1.66	153	151.34	0.00	5	5.00	1.66	0	(1.66)	664.06	663	(1.06)
Professional	315.55	189	(126.55)	41.52	137	95.48	2.77	447	444.23	0.00	8	8.00	2.77	0	(2.77)	1658.03	1402	(256.03)
A&E, Science, Computer	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
Technical	3.53	5	1.47	0.20	1	N/A	0.00	4	4.00	0.00	1	1.00	0.00	0	N/A	21.68	24	2.32
Sales	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
Administrative Support	81.12	95	13.88	6.24	47	40.76	0.00	19	19.00	0.00	1	1.00	0.00	0	N/A	375.84	428	52.16
Services	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
Crafts	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
Operative Workers	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
Transportation	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
Laborers	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00

Goals are set by job categories for each protected group. An underrepresentation is indicated by a negative number, but if the DISCREPANCY is less than -1.00 position, a N/A will be displayed to show there is no underrepresentation.

000195

REQUEST FOR COUNCIL ACTION
CITY OF SAN DIEGO1. CERTIFICATE NO.
(FOR AUDITOR'S USE ONLY)
2800894

TO: CITY ATTORNEY 2. FROM (ORIGINATING DEPARTMENT): BUSINESS OFFICE 3. DATE: June 10, 2008

4. SUBJECT:

Authorize managed competition consultant support contract and funding.

5. PRIMARY CONTACT (NAME, PHONE, & MAIL STA.) Anna Danegger, 619/236-6107, MS 9A 6. SECONDARY CONTACT (NAME, PHONE, & MAIL STA.) Mark Patzman, 619/533-3915, MS 8A 7. CHECK BOX IF REPORT TO COUNCIL IS ATTACHED ☒

8. COMPLETE FOR ACCOUNTING PURPOSES

FUND	100			9. ADDITIONAL INFORMATION / Total expended: FY 2007 \$54,040.50 FY 2008 \$195,097.00 Total Contract \$249,137.50 expended to date
DEPT.	602			
ORGANIZATION				
OBJECT ACCOUNT	48818			
JOB ORDER	000602			
C.I.P. NUMBER				
AMOUNT	\$400,000			

10. ROUTING AND APPROVALS

ROUTE (#)	APPROVING AUTHORITY	APPROVAL SIGNATURE	DATE SIGNED	ROUTE (#)	APPROVING AUTHORITY	APPROVAL SIGNATURE	DATE SIGNED
1	ORIGINATING DEPRATMENT		6/10/2008	6	AUDITOR/ COMPTROLLER		6/11/08
2	EOC		6/11/08	7	CFO		6/11/08
3	CONTRACTING		6/11/08	8	COO		6/11/08
4	LIAISON OFFICE		6/11/08	9	CITY ATTORNEY		
5	FINANCIAL MANAGEMENT		6/11/08	<input type="checkbox"/> REFER TO: _____ COUNCIL DATE: 6/23/08 SC for EAP 6/2/08			

11. PREPARATION OF: ☒ RESOLUTIONS ☐ ORDINANCE(S) ☐ AGREEMENT(S) ☐ DEED(S)

- 1) Authorize contract 8020-07-Z with Grant Thornton LLP for managed competition program support with an authorization to expend, not to exceed limit of \$1,100,000, contingent upon the City Comptroller certifying that funds are available.
- 2) Authorize the City Comptroller to appropriate and expend \$400,000 in the Business Office (Fund 100, Dept 210) from the General Fund Appropriated Reserves (Fund 100, Dept 602) to fund managed competition consultant support.
- 3) Direct the City Attorney to prepare the appropriate resolutions and/or ordinances in accordance with Charter Section 40.

11A. STAFF RECOMMENDATIONS: Adopt the resolutions.

12. SPECIAL CONDITIONS (REFER TO A.R. 3.20 FOR INFORMATION ON COMPLETING THIS SECTION.)

COUNCIL DISTRICT(S): ALL

COMMUNITY AREA(S): ALL.

ENVIRONMENTAL IMPACT: THIS ACTIVITY IS EXEMPT FROM THE CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) PURSUANT TO STATE CEQA GUIDELINES, SEC. 15061 (B) (3).

HOUSING IMPACT: NONE.

OTHER ISSUES: NONE.

CITY CLERK INSTRUCTIONS: PLEASE FORWARD A COPY OF THE RESOLUTION TO ANNA DANEGGER, MS 9A.

EXECUTIVE SUMMARY SHEET
CITY OF SAN DIEGO

DATE ISSUED:

REPORT NO:

ATTENTION: Council President and City Council
ORIGINATING DEPARTMENT: Business Office
SUBJECT: Managed competition support contract
COUNCIL DISTRICT(S): All
CONTACT/PHONE NUMBER: Anna Danegger 619/236-6107

REQUESTED ACTION:

- 1) Authorize contract 8520-07-Z with Grant Thornton, LLP for managed competition statement of work (SOW) development and program support with an authorization to expend not to exceed limit of \$1,100,000, contingent upon funds being available.
- 2) Authorize the City Comptroller to appropriate and expend \$400,000 in the Business Office (Fund 100, Dept 210) from the General Fund appropriated reserves (Fund 100, Dept 602) to fund managed competition consultant support.

STAFF RECOMMENDATION: Approve requests.

EXECUTIVE SUMMARY:

Essential elements of a successful managed competition program include detailed preliminary planning and well defined, performance-based Statements of Work (SOW). In order to gain the specialized knowledge and experience necessary to support these processes, the managed competition program issued a Request for Proposals (RFP) on October 19, 2006. Four proposals were received and were evaluated separately for technical merit and price. Grant Thornton was evaluated the best value provider and was awarded a one-year contract, with four option years. The scope of work for the consultant includes: preliminary planning including functional scoping and grouping, workload and data systems collection, market research, and determination of baseline costs; development project schedules; SOW and RFP development support; post-award support; training; and overall project support.

During the past fourteen months, the City has issued task-orders under limited notice to proceed for discrete elements of work to assist the City with program development, preliminary planning and pre-competition assessment. For fiscal year 2007 the City issued three task orders, expending a total of \$54,040.50. In the current fiscal year, the City has issued one task order, expending \$195,097.00. The total contract value to date is \$249,137.50.

This contract is an "indefinite delivery, indefinite quantity" (IDIQ) format wherein task orders are issued on an as needed basis. This contract type is used when the exact delivery times and/or quantities of services required under the contract are not known when the contract is awarded, but a recurring need is anticipated. Included in the RFP was a cost comparison worksheet that dictated a set quantity of hours (6,100) and was to be completed by proposers and included as their price proposal. This worksheet was used strictly for comparison and price proposal evaluation purposes. Therefore, despite that fact that the price proposals returned estimates in excess of the \$250,000

000198

threshold required to bring a consulting contract to the City Council for approval, these estimates were based on an arbitrary quantity of consultant time and there was no basis to assume that this quantity of work was actually being procured.

The managed competition program has made significant progress and is now in need of more robust support to assist in SOW development. It is requested that the Council continue to provide for this program and authorize the contract.

FISCAL CONSIDERATIONS:

Funding to support this contract is requested in the amount of \$400,000 via transfer from Fiscal Year 2008 General Fund Appropriated Reserves. The remaining funding requirement will be drawn from the proposed Fiscal Year 2009 budget as approved by Council.

PREVIOUS COUNCIL and/or COMMITTEE ACTION:

March 27, 2006. City Council adopted Ordinance O-19474, placing on the November 7, 2006 ballot the proposition to amend Article VIII of the City Charter by adding subsection (c) regarding the use of managed competition to section 117.

January 9, 2007. City Council approved Ordinance O-19565, which amended Article 2, Division 37 of the Municipal Code.

COMMUNITY PARTICIPATION AND PUBLIC OUTREACH EFFORTS:

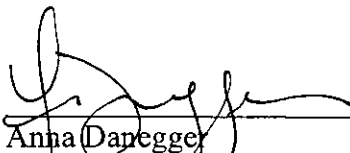
Thirty-seven potential consultants were contacted and made aware of the RFP. The RFP was advertised in the *San Diego Daily Transcript* and posted to the City's official web site.

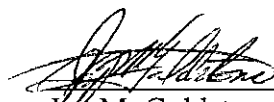
KEY STAKEHOLDERS AND PROJECTED IMPACTS:

Interested parties include:

- The voters of the City of San Diego, who expressed their enthusiasm for a managed competition program within the City of San Diego (City) through their approval of Proposition C in November 2006
- City employees
- The City's recognized labor unions
- Local businesses
- The residents and visitors of the City of San Diego

Managed competition is intended to aide the City of San Diego in ensuring that it is delivering quality services to taxpayers, residents, and visitors in the most economical and efficient means possible.


Anna Daregger
Director, Business Office


Jay M. Goldstone
Chief Operating Officer

The City of San Diego
CERTIFICATE OF CITY AUDITOR AND COMPTROLLER

000199

CERTIFICATE OF UNALLOTTED BALANCE

ORIGINATING

AC 2800894

DEPT. NO. 210

I HEREBY CERTIFY that the money required for the allotment of funds for the purpose set forth in the foregoing resolution is available in the Treasury, or is anticipated to come into the Treasury, and is otherwise unallotted.

Amount: _____ Fund: _____

Purpose: _____

Date: _____ By: _____

AUDITOR AND COMPTROLLER'S DEPARTMENT

ACCOUNTING DATA											
ACCTG. LINE	CY PY	FUND	DEPT	ORG	ACCOUNT	JOB ORDER	OPERATION ACCOUNT	BENF/	EQUIP	FACILITY	AMOUNT
TOTAL AMOUNT											

FUND OVERRIDE ☐

CERTIFICATION OF UNENCUMBERED BALANCE

I HEREBY CERTIFY that the indebtedness and obligation to be incurred by the contract or agreement authorized by the hereto attached resolution, can be incurred without the violation of any of the provisions of the Charter of the City of San Diego; and I do hereby further certify, in conformity with the requirements of the Charter of the City of San Diego, that sufficient moneys have been appropriated for the purpose of said contract, that sufficient moneys to meet the obligations of said contract are actually in the Treasury, or are anticipated to come into the Treasury, to the credit of the appropriation from which the same are to be drawn, and that the said money now actually in the Treasury, together with the moneys anticipated to come into the Treasury, to the credit of said appropriation, are otherwise unencumbered.

Not to Exceed: \$400,000.00

Vendor: Grant Thornton, LLP

Purpose: Authorize contract with above vendor for managed competition program support with authorization to expend, not to exceed \$1,100,000, contingent upon the City Comptroller certifying funds are available. Authorize the City Comptroller to appropriate and expend \$400,000 (Fund 100, Dept 210) from the GF Approp. Reserves (Fund 100, Dept 602).

Date: June 11, 2008 By:  6/11/08

AUDITOR AND COMPTROLLER'S DEPARTMENT

ACCOUNTING DATA											
ACCTG. LINE	CY PY	FUND	DEPT	ORG	ACCOUNT	JOB ORDER	OPERATION ACCOUNT	BENF/	EQUIP	FACILITY	AMOUNT
001	0	100	602		48818	000602					\$400,000.00
TOTAL AMOUNT											\$400,000.00

RESOLUTION NUMBER R-_____

DATE OF FINAL PASSAGE _____

A RESOLUTION AUTHORIZING A CONTRACT WITH
GRANT THORTON LLP FOR MANAGED COMPETITION
PROGRAM SUPPORT.

BE IT RESOLVED, by the Council of the City of San Diego that the Mayor is authorized and empowered to execute, for and on behalf of said City, an agreement with Grant Thorton LLP, for managed competition program support, under the terms and conditions set forth in the Agreement on file in the office of the City Clerk as Document No. RR _____.

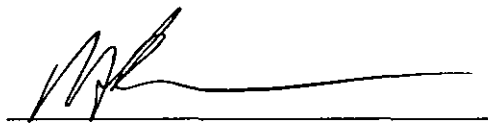
BE IT FURTHER RESOLVED, that the contract with Grant Thorton has an authorization to expend an amount not to exceed \$1,100,000, contingent upon the City Auditor and Comptroller first certifying that funds are available.

BE IT FURTHER RESOLVED, that the City Auditor and Comptroller is authorized to appropriate and expend an amount not to exceed \$400,000 in Business Office (Fund 100, Department 210) from the General Fund Appropriated Reserves (Fund 100, Department 602) to fund managed competition consultant support.

BE IT FURTHER RESOLVED, that this activity is exempt from California Environmental Quality Act [CEQA] pursuant to State CEQA Guidelines Section 15061 (b)(3).

APPROVED AS TO FORM ONLY:
MICHAEL J. AGUIRRE, City Attorney

By



Michael P. Calabrese
Chief Deputy City Attorney

MPC:sc
06/19/08
Aud.Cert.: AC2800894
Or.Dept: Business Office
R-2008-1181

I hereby certify that the foregoing Resolution was passed by the Council of the City of San Diego, at this meeting of _____.

ELIZABETH S. MALAND
City Clerk

By _____
Deputy City Clerk

Approved: _____
(date)

JERRY SANDERS, Mayor

Vetoed: _____
(date)

JERRY SANDERS, Mayor